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ABSTRACT

The program management guide to Title IV Indian Education projects acquaints participants with program management concepts relative to application forms and encourages the development of management plans and objectives. Sections provide discussions, charts, and examples for the following: regulatory authorities, administrative organizational systems; managerial responsibilities, and managerial planning aides. Specific sections include: an overview of project management responsibilites, planning-programming-budgeting system, flow chart techniques, information management, physical resources management, monitoring project activities, and project management timeline. Appendices contain: a cross-reference with federal regulations to use in designing a management plan, a description of Title IV budget formulation, a list of responsibilities of the local educational agency and of the parent committee in the operation of a project, and hints for setting up and maintaining a file system. (AH)

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PROGRAM MANAGEMENT

ED225788

RC01 3836

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The following material on Program Management was developed by Resource and Evaluation Center II, United Tribes Educational Technical Center, Bismarck, North Dakota. The contents of this programmatic guide were developed with financial assistance from the Office of Indian Education Programs, Department of Education, Contract number 300820025. However, the contents do not necessarily represent the position of policy of that agency and a reader should not infer endorsement by the Federal Government.

The purpose of this presentation is to acquaint participants with Program Management concepts relative to application forms and to encourage the development of management plans and objectives. Participants will be made aware of regulatory authorities, administrative organizational systems, managerial responsibilities, and managerial planning aides. Participants will be able to relate information to required application forms.

Materials developed by Center III, United Indians of All Tribes Foundation, Seattle, Washington, and Center V, Native American Research Institute at Normon, Oklahoma, were utilized in this guide.

PROGRAM MANAGEMENT RESPONSIBILITIES (Parts A, B & C)

- STATE AND LOCAL GOVERNMENTS ARE RESPONSIBLE FOR THE EFFICIENT AND EFFECTIVE **ADMINISTRATION OF GRANT AND CONTRACT PROGRAMS** THROUGH THE APPLICATION OF **SOUND MANAGEMENT PRACTICES**

- THE GRANTEE OR CONTRACTOR ASSUMES THE **RESPONSIBILITY FOR** SEEING THAT FEDERALLY ASSISTED PROGRAM **FUNDS HAVE BEEN EXPENDED AND ACCOUNTED FOR CONSISTENT WITH UNDERLYING AGREEMENTS AND PROGRAM OBJECTIVES**

- EACH GRANTEE OR CONTRACTOR ORGANIZATION, IN RECOGNITION OF ITS OWN UNIQUE COMBINATION OF STAFF FACILITIES AND EXPERIENCE WILL HAVE THE PRIMARY RESPONSIBILITY FOR EMPLOYING WHATEVER FORM OF ORGANIZATION AND MANAGEMENT TECHNIQUES NECESSARY TO ASSUME PROPER AND EFFICIENT ADMINISTRATION

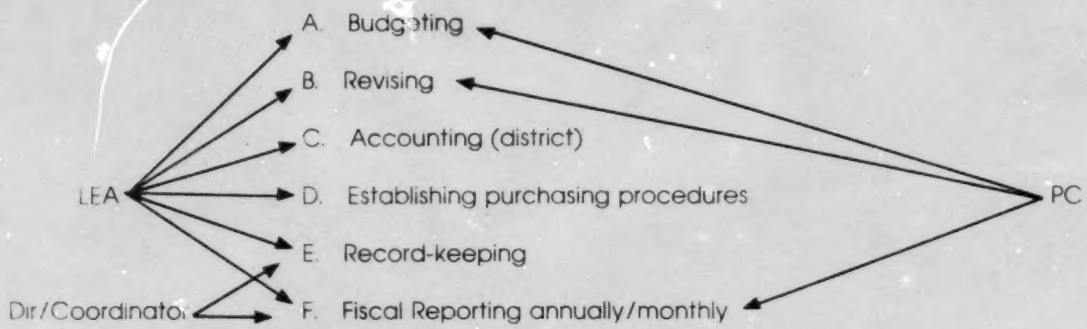
  - EFFECTIVE CONTROL AND ACCOUNTABILITY SHALL BE MAINTAINED FOR ALL GRANT OR SUBGRANT CASH, REAL OR PERSONAL PROPERTY AND OTHER ASSETS. RECIPIENTS SHALL ADEQUATELY **SAFEGUARD ALL SUCH PROPERTY SHALL ASSURE THAT IT IS USED SOLEY FOR AUTHORIZED PURPOSES.**

  - IF APPROPRIATE OR SPECIFICALLY REQUIRED, RECIPIENTS SHALL RELATE **FINANCIAL INFORMATION TO PERFORMANCE OR PRODUCTIVITY DATA**

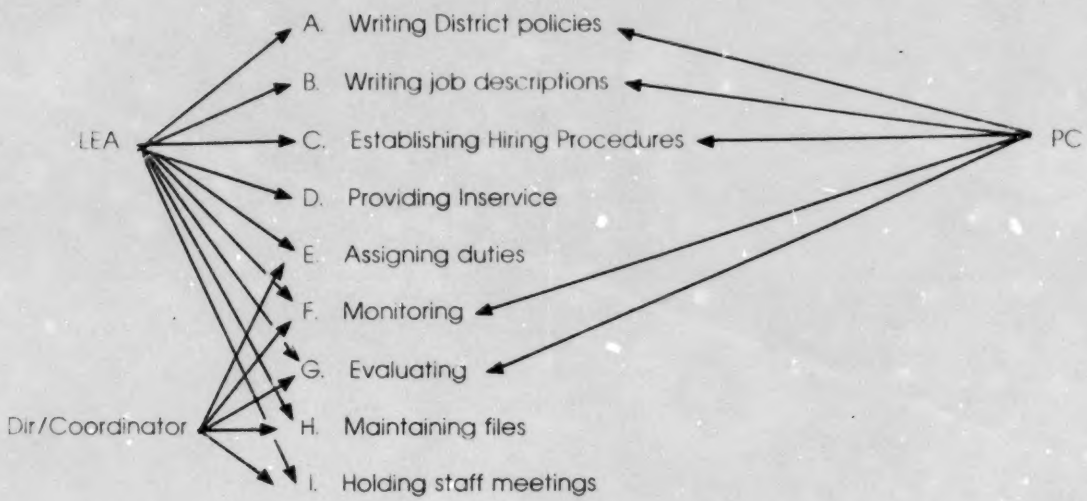
SOURCE: EDUCATION DIVISION GENERAL ADMINISTRATIVE REGULATIONS (EDGAR)

Overview of Title IB-A Project Management Responsibilities

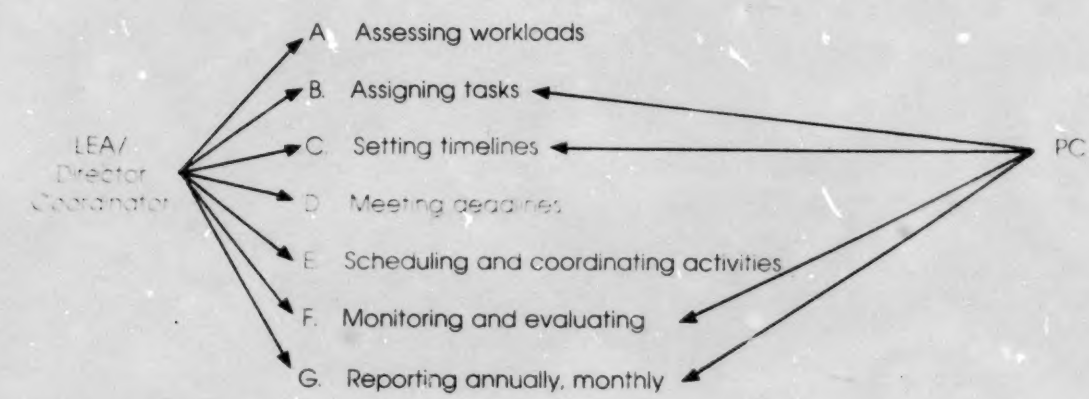
FISCAL RESOURCES MANAGEMENT



PERSONNEL MANAGEMENT



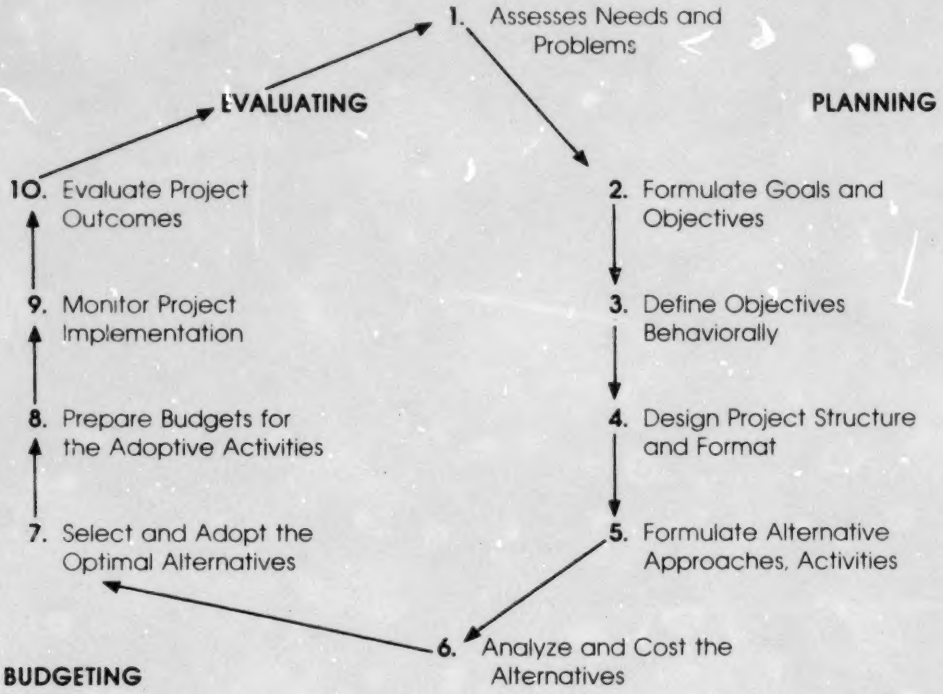
TIME MANAGEMENT



The following chart shows the Planning-Programming-Budgeting System which is the basis for project design as used in the Indian Education Act, Title IV, rules and regulations.

PLANNING-PROGRAMMING-BUDGETING SYSTEM

Planning-Programming-Budgeting System (PPBS) originated at the national level in the U.S. Department of Defense and is now a widely used managerial approach to planning. It has useful application to planning in Title IV projects. The main parts of the system are diagrammed below.


1. Assesses Needs and Problems
PLANNING
2. Formulate Goals and Objectives
3. Define Objectives Behaviorally
4. Design Project Structure and Format
5. Formulate Alternative Approaches, Activities
PROGRAMMING
6. Analyze and Cost the Alternatives
BUDGETING
7. Select and Adopt the Optimal Alternatives
8. Prepare Budgets for the Adoptive Activities
9. Monitor Project Implementation
10. Evaluate Project Outcomes
EVALUATING

At steps **2**and **3** the system involves developing objectives. The objectives are developed from goals formulated to meet the needs of the Indian participants or students to be served by the project. The objectives are initially developed in broad terms. They are refined and detailed as the planning and programming process continues. By the time that the application is written, the objectives should be specific and clear statements that directly relate to reaching the goals of the project. The objectives should be written in such a way that the degree to which the objective is reached can be **measured.**

The main purpose of the measurable objectives are:

1. To provide a basis for the selection and/or design of instructional content, activities, materials, personnel, and procedures designed to meet the needs of the participants.

2. To provide a basis for evaluating the results of the instruction and activities provided by the project.

3. To provide the participant with direction and knowledge of the purpose of the instruction to coordinate efforts in the teaching/learning process.

Measurable objectives serve multiple purposes at various levels in the organization. **Some objectives may be worded in such a manner so as to be useful at the management level, in which case they stress the first two of the three purposes listed above. Management by objectives (MBP) is a management process that emphasizes the development and use of management level objectives.** Such objectives might be thought of as the "blueprints" to guide in the management of the overall project.

The technical level is that level at which teaching, counseling, delivery of a service, or the use of an activity occurs. At the technical level, measurable objectives are commonly called instructional objectivs, or, as popular during the 1960s, behavioral objectives (Mager, 1975.)

FLOW CHART TECHNIQUES

Once goals have been agreed upon the group is ready to engage in planning specific activities and events. **PROGRAM EVALUATION REVIEW TECHNIQUE (PERT)** is one approach to this planning.

PERT can be useful in many different kinds of projects. It can be used in the planning and management of highly complex projects which take place over extended periods of time. It is also helpful in short-term projects with clearly defined goals and definite time constraints.

PERT is a process of charting tasks which must be done in order for the project to be completed. This process consists of subdividing a total project into smaller and more easily managed elements. The distinguished characteristic of PERT is that it provides a graphic representation of a project from start to finish. The representation is generally referred to as the PERT hart or PERT network. The network is made up of the tasks to be accomplished; it includes the interrelationships and interdependencies of all of the tasks in order they must be completed.

In the development of a PERT network, the project is broken into events, the major starting or completion points throughout the span of the entire project. The events are supported in the network by planning for all of the activities and resources needed to reach each event or completion checkpoint.

The PERT technique is diagnostic and prognostic. The procedure is:

A. Determine a goal.

B. Identify major objectives.

C. Develop Activities Charts.

D. Study relationships and dependencies of major objectives.

E. Develop network.

F. Test logic of network

G. Impose arbitrary time demand.

H. Plug in time estimates.

I. Make calculations.

J. Identify critical path.

K. Make decisions of time legitimacy.

L. Identify options and trade-offs.

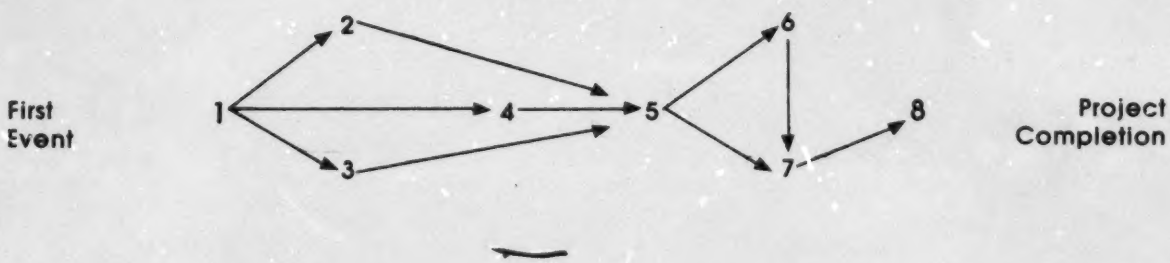
M. Conjure situations which allow slack time.

N. Calculate: Earliest Expected Time
Latest Allowable Time
Slack Time

PERT networking forces planners to make close time estimates for the completion of each job and activity. This method of estimating time requirements is extremely important because it helps to keep a project moving along a reasonable item line and lets those involved in the project see where they are as related to where they should be.

PERT, as a planning technique, can be used with very little training in the process. First-time jobs or projects in which there has been no previous experience in planning or controlling particularly lend themselves to PERT planning; however, this technique can be applied to the almost any project for which logical planning is required. PERT, however, lends itself more to short or medium-range planning than to long-range planning, and requires a good knowledge of the elements of planning.

A sample PERT network appears below.



In this example, events 2 and 3 may be pursued at the same time but must be completed before event 5. Events 6 and 7 may be pursued at the same time as 6, although 6 will need to be completed before 7. One moves from events 1 through 8 in operation, but in planning the network one moves from events 8 through 1.

INFORMATION MANAGEMENT

LEA ◄ ►	1. Establishing and maintaining two-way communication system	◄ ► PC
LEA ►	2. Disseminating information (Regulations, proposals, newsletters)	► PC
LEA ◄ ►	3. Correspondence with I.E.P Resource Centers, other educational agencies	◄ PC
LEA ►	4. Performance, reporting- monthly, annually	► PC ► I.E.P.
LEA ►	5. Notifying community	◄ PC
LEA ►	6. Maintaining repository	► PC ► comm.
LEA ►	7. Maintaining filing system	
LEA ◄	8. Maintaining minutes of meetings	◄ PC
LEA ►	9. Retention of records	

PHYSICAL RESOURCES MANAGEMENT

1. Establishing and maintaing adequate facilities
2. Acquiring needed supplies and equipment
3. Establishing and maintaing inventory control

MONITORING PROJECT ACTIVITIES

Monitoring–keeping track of the progress of specified activities to see if and to what degree the project is proceeding as planned, i.e., doing what it is suppose to be doing.

The monitoring procedure should answer several questions about the activities designed to accomplish each objective. These questions are:

1) are the activities actually taking place?

2) are the activities taking place in the specified quantity?

3) are the specified number of projects participants being served?

4) are the project participants being served by the appropriate individuals?

5) are the activities of sufficiently high quantity?

Documentation–a method of providing written evidence pertinent to each of the above questions.

DOCUMENTATION CHART

Activity	Documentation	Person Responsible	Date

TITLE IV PART A PROJECT MANAGEMENT TIMELINE

MONTH	PROJECT DIRECTOR/STAFF	PARENT COMMITTEE
AUGUST	Hire for vacant positions	Follow procedures for involvement in hiring project staff
	Plan, begin Needs Assessment	Participate in planning Needs Assessment
SEPTEMBER	Begin count of eligible students	
	Identify students for services--assess, pre-test, etc.	Parent Committee election of members, officers
	Place and begin serving students	
OCTOBER	Meet with Independent Evaluator	
	Prepare preliminary student count	
NOVEMBER	Review Needs Assessment results, set priorities	Review Needs Assessment Results, set priorities
	Design objectives, begin writing project application narrative	Participate in designing project objectives
DECEMBER	Hold Public Hearing	
	Prepare final student count	
JANUARY	Complete, submit application to OIE (revise if needed according to public hearing)	Review, approve application for submission tc OIE
FEBRUARY	Mid-year evaluation/assessment of project	Monitoring report from staff
MARCH	Respond to review letter from OIE	Review, approve response to review letter from OIE
APRIL		
MAY	Review final report from Independent Evaluator	Review final report from Independent Evaluator
	Receive Grant Award Notice and final grant amount (revise budget)	Review, approve revised budget
JUNE	Prepare and submit Grant Performance Report to OIE	Review, approve Grant Performance Report before submission to OIE
JULY		

APPENDIX

Designing a Management Plan: Cross-Reference with Federal Regulations as contained in 45 CFR Parts 186., 186a., 100a., and Part 74.

	Section	Page
Application Contents	186a.25	34158
Describe the Project	100a.110-117	22502
Project Staff	100a.510-519	22510
Conflict of Interest: Participation in a project	100a.525	22511
Coordination with other activities	100a.580	22512
	100a.581	22512
Administrative Responsibilities of a Grantee	100a.700-741	22514

*** NOTE: 100 numbers will change to 200 numbers in the new Title IV Rules and Regulations due out in the near future.**

TITLE IV - BUDGET FORMULATION

BUDGET

-The budget should be based on the needs of the project.
-The budget is one of the most important areas of proposal development.
-The LEA and PC should be involved in planning the budget.
-The budget is calculated on a line item basis.
-The budget must be clearly defined and justified.
-Budget development is last stage of application process.

BUDGET DEVELOPMENT

Identify needs of project.
Determine amount of resources available.
Identify the best cost effective way to implement program.

AMOUNT OF THE GRANT

Multiply the number of Indian children enrolled in the schools of the applicant to whom it provides free public education (506 Forms).

X

The average per pupil expenditure for all LEA's in the State in which the applicant is located.

=

AMOUNT OF GRANT

Note: The actual amount of the grant may vary dependng on available appropriations.

PART III - BUDGET INFORMATION

Section A - Budget Summary
Section B - Budget Categories
Section C - Non-Fedaeral Resources
Section D - Forcasted Cash Needs
Section E - Budget Estimated of Federal Funds Needed for Balance of the Project
Section F - Other Budget Information

BUDGET CATEGORIES

a) Personnel
b) Fringe Benefits
c) Travel
d) Equipment
e) Supplies
f) Contractual
g) Construction
h) Other
i) Total Direct Charges
j) Indirect Charges
k) Totals

SAMPLE BUDGET - Section F - 21-Direct Charges 22-Indirect Charges 23-Remarks

PERSONNEL

-Salaries and wages of program personnel.
-Note: Consultant fees and expenses must be included in **Other.**
-Statement needed which show the total commitment of time and salary.
-Note: If people are working for the project but not paid by the project, make sure to indicate but don't include cost in budget.

Example:

1 - Teacher (180 day contract) To carry out objective #4	$10,000
.5 - Aide (½ day - 5 days per week) To supervise Learning Resource Center for Indian Children. Note: Johnson O'Malley pays other ½ of salary $3,000.00	$3,000.00
.5 - Secretary (½ day - 5 days per week) To keep records (business and financial) and program office management. . .	$3,000.00

FRINGE BENEFITS

-Leave blank if fringe benefits applicable to direct salaries and wages are included as part of the indirect cost rate.

Example:

1 - Teacher X 18%	= $ 1,800.00
.5 - Aide X 10%	= $ 300.00
.5 - Secretary X 10%	= $ 300.00

TRAVEL

-Purpose, destination, number traveling direct cost.
-Indirect total amount for travel by staff members, consultants, parent committee members, and project participants.
-Note: If any costs are absorbed by the school district please indicate.
-Budget can be revised by contacting Title IV after approved.
-Funds can be used for personnel to attend regional Title IV meetings.
-Note: Use school district rates.

Example:

Local Travel

1 - Teacher - Travel between school buildings and childrens homes.		
800 miles @ $.20 per mile	= $	160.00
200 miles per month @ $.20 per mile	= $	360.00

Regional Travel

Title IV meetings - Preapplications, etc.		
2 trips to Bismarck X 500 miles X @ $.20 (automobile)	= $	200.00
4 people X 6 days @ $15.00 per day for meals	= $	360.00
Lodging 6 days X 4 people @ $25.00 per night	= $	600.00

National Travel

Same as above

Student Travel

20 students to attend a college career fair at UND

Travel 400 miles to Grand Forks X $.75 (bus)	= $	300.00
Meals 20 students X $7.00 per day	= $	140.00

Local Parent Travel

Same as above

EQUIPMENT

-Indicate the cost of equipment having a useful life of more than one year and an acquisition cost of $300.00 or more per unit.
-Item number of units, cost per unit, and total cost.

Example:

Tape recorders X 3 units @ $50.00
To be used with the Indian club to carry out Cultural Componenet in objective #4. To be used in the reading program. = $ 150.00

SUPPLIES

-Include costs for all tangible personal properties.
-Note: If funds are left over at the end of the program, an extention can be granted by contacting Title IV 45 days before end of program.
-Keep costs reasonable.

Example:

-Office Supplies (staples, clips, paper, pencils, ribbon, etc.)	= $	400.00
-Xeroxing	= $	300.00
-Instructional	= $	500.00
-Cultural	= $	400.00

CONTRACTUAL

-State proposed activities and amount of contracting.
-List items project has agreed to in contract form.
-Teacher contracts don't go here.
-Do not include payments to individuals, such as consulting fees, benefits, etc.

Example:

Xerox machine @ $100.00 per month X 9 months	= $	900.00
Bus contract (1 day per month) for 9 months @ $100.00	= $	900.00

CONSTRUCTION

-Indirect costs of minor remodeling.
-Construction not allowable.
-Must be reasonable costs.
-Must be a one time cost.

Example:

Remodel study area

-10 sheets of plywood @ $10.00 per sheet	= $ 100.00
-Repair lighting system	= $ 300.00
-4 gal. paint @ $10.00 per gal.	= $ 40.00
-50 sq. yards of carpet @ $8.00 per yard	= $ 400.00

OTHER

-List anything that doesn't apply in above areas.
-Space or equipment rental, consulting fees, communication costs, utilities, custodial services, printing materials, and parent costs.
-Provide a breakdown that clearly identifies the amount and purpose of each expense.

Example:

-2 consultants @ $100.00 per day X 10 days - To carry out program evaluation.	= $ 2,000.00
-5 consultants @ $50.00 per day X 10 days - To serve as resources in the Cultural Component and Indian Club.	= $ 2,500.00

= TOTAL DIRECT CHARGES

-Show the totals of PERSONNEL to OTHER.

INDIRECT CHARGES

-Show the indirect cost.

TOTAL COST

-Show total program costs.

Note: Indicate that programs should give preference to Indian owned and operating establishments (Business, etc.).

SUBPART E - OPERATING A PROJECT

186a.40 Responsibilities of the local educational agency.

It is the responsibility of the LEA to–

(a) Ensure that a parent committee is selected in accordance with 186a.21;

(b) Consult with and involve the parent committee in all phases of the project;

(c) Perform a needs assessment that meets the requirements of 186a.21;

(d) Design a project that meets the requirements of 186a.22 and an evaluation plan that meets the requirements of 186a.23;

(e) Conduct a public hearing in accordance with 186a.24;

(f) Secure the parent committee's written approval of the project application for continuation awards, and amendments to applications (including revisions to the project budget and project design) before those documents are submitted to the Secretary;

(g) Provide the parent committee with copies of 45 CFR Parts 186 and 186a, other applicable regulations, the grant award document, and correspondence to or from the Department of Education relating to the project.

(h) Prepare the parent committee to carry out its responsibilities by, for example, holding workshops on 45 CFR Parts 186 and 186a and on other applicable regulations;

(i) With the advice of the parent committee, develop policies and procedures relating to the hiring of project staff;

(j) Hire the project staff after considering any recommendations of the parent committee;

(k) Use the best available talents and resources, including persons from the Indian community, in carrying out the project;

(l) Monitor and evaluate the project in accordance with an evaluation plan that meets the requirements of 186a.23;

(m) Make available to the parent committee and to the Indian community records, including financial records, relating to the project except those records that are protected by law from disclosure; and

(n) Ensure that a student certification form is on file for each student included in the count of Indian Students on which the amount of an entitlement is based.

186a.41 Responsbilities of the parent committee.

It is the responsibility of the parent committee to–

(a) Adopt by-laws. These by-laws shall include, at a minimum, provisions on–

(1) The selection and duties of officers;

(2) Filling vacated terms on the committee;

(3) The conduct of business meetings; and

(4) Amending the by-laws;

(b) Participate in the assessment of needs, and the design, operation, and evaluation of the project;

(c) Review and approve in writing before they are submitted to the Secretary, the project application, applications for continuation awards, and amendments to applications (including revisions to the project budget and project design);

(d) Advise the LEA on the development of policies and procedures relating to the hiring of project staff;

(e) Review the qualifications of and make recommendations concerning applicants for project staff positions; and

(f) Make available to the community copies of its records, such as by-laws, minutes of meetings, and the list of committee members except those records that are protected by law from disclosure.

PROJECT FILING

1. Hints for setting up a file system:

-Establish responsibilities for organizing and maintaining files.
-List out types of information to be collected and stored.
-Determine which documents are needed in central file and which may be kept by individual staff.
-Determine categories and subcategories. (may be alphabetical, numerical, geographic)
-Determine amount of space needed (allow for growth).
-Identify and secure needed supplies (filefolder, labels, separaters).
-Determine where files will be stored for accessibility.
-Duplicate original documents and cross-file where necessary.
-Label the outside of file drawers.
-Separate public and private files.
-Provide locking drawers for private files.
-Prepare and post file index on wall.
-Establish check-in/check-out sheet if secretary or file clerk does not have that responsibility.

2. Hints for maintaining file system:

-Separate active from inactive files.
-Determine which documents are to be stored (5 years retention).
-Determine which documents may be discarded.
-Create new categories or sub-categories as needed.
-Set aside time for "file browsing."
-Continue to orient staff to organization and use of files as required.

PROJECT FILES
Part A

PARENT COMMITTEE
- Bylaws
- Minutes
- Regulations
  - IEA
  - EDGAR
- IEP Correspondence
- Grant Award Letter
- Membership List
- Applications/Proposals
- Election Documentation
- Public Hearing Documentation
- Copies of Program & Budget Revisions
- Copies of Reports:
  - Financial
  - Performance
  - Evaluation

BUDGET
- Approved Budget Line Items & Budget Breakdown
- Approved Budget Revisions
- Grant Award Documents
- Final Financial Reports
- Source Documentation
  - Purchase orders
  - Invoices
  - Receipts
  - Cancelled Checks
- Computer Printouts
- Monthly or Quarterly Reports

STUDENT RECORDS
- 506 Forms
- Student Achievement Records & GPA's
- Student Attendance Records
- Drop-Out Records
- Financial Need Eligibility Records
- Demographic Data

REPORTS
- Final Performance Report
- Final Financial Report
- Annual Evaluation Report Process Evaluation Data (Monitoring) Product Evaluation Data
- Interim Evaluation Reports
- Periodic Monitoring Reports
- Inventories

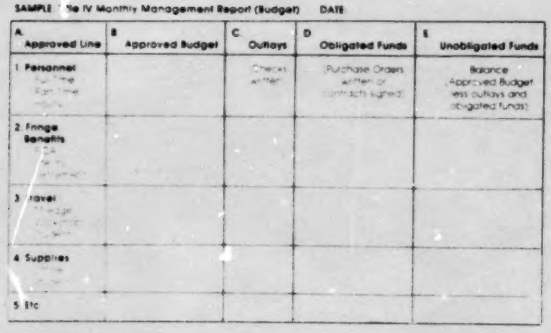
DOCUMENTS
- Rules and Regulations IEA, EDGAR
- Applications/ Proposals
- Grantee Policies and Procedures
- State and Federal Laws

CORRESPONDENCE
- In-Coming/Out-going
  - Inter-office
  - Inter-district
  - Local Community
  - Indian Parent Committee
  - State Education Agency
  - Higher Ed. Institution
  - Other IV-A Projects
  - Resource Centers
  - IEP Office
  - Indian Tribes/ Organizations

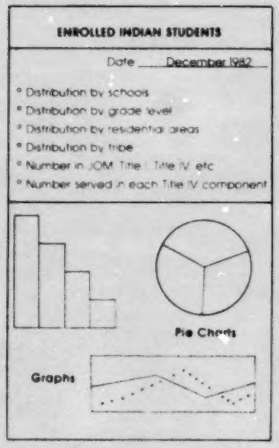
etc....

PERSONNEL
- Job Descriptions
- Applications
- Resumes
- Fringe Benefits
- Performance Evaluations
- Contracts
- Personnel Policies
- Records of In-service training

MISCELLANEOUS
- Training Materials
- Resource Lists
- Newspaper Clippings
- Thank You Letters
- etc.


SAMPLE Title IV Monthly Management Report (Budget) DATE

A. Approved Line	B Approved Budget	C Outlays	D Obligated Funds	E Unobligated Funds
1 Personnel		Checks written	Purchase Orders written or contracts signed	Balance (Approved Budget less outlays and obligated funds)
2 Fringe Benefits				
3 Travel				
4 Supplies				
5 Etc				

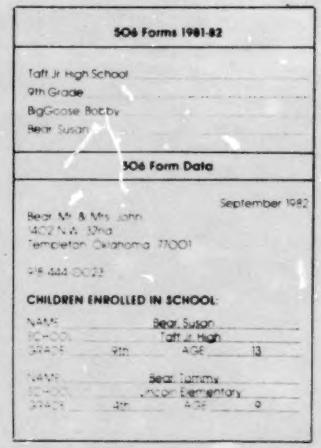

ENROLLED INDIAN STUDENTS

Date December 1982

- Distribution by schools
- Distribution by grade level
- Distribution by residential areas
- Distribution by tribe
- Number in JOM Title I Title IV etc
- Number served in each Title IV component

Pie Charts

Graphs


506 Forms 1981-82

Taft Jr High School
9th Grade
BigGoose Bobby
Bear Susan

506 Form Data

September 1982

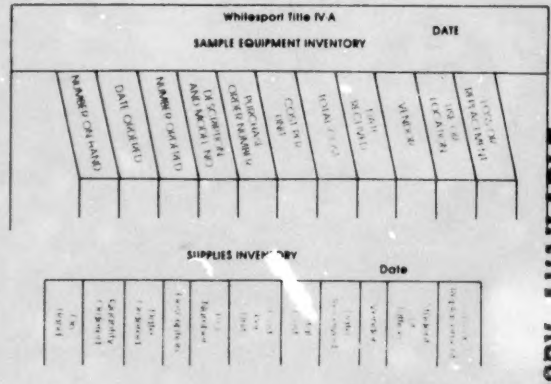
Bear Mr & Mrs John
1402 N.W. 32nd
Templeton Oklahoma 77001

918 444-0023

CHILDREN ENROLLED IN SCHOOL

NAME Bear, Susan
SCHOOL Taft Jr. High
GRADE 9th AGE 13

NAME Bear, Tammy
SCHOOL Upper Elementary
GRADE 4th AGE 9


Whitesport Title IV-A

SAMPLE EQUIPMENT INVENTORY

DATE

NAME(S) ON NAME DATE ORDERED NAME(S) ON ORDER DATE RECEIVED ITEM DESCRIPTION COST PER ITEM TOTAL COST SPECIFICATIONS VENDOR DATE PAID

SUPPLIES INVENTORY

Date

BEST COPY AVAILABLE

PROJECT FILES

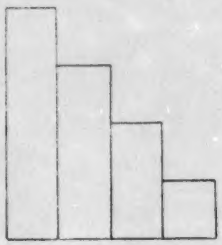
STUDENT RECORDS

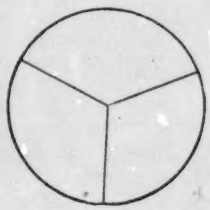
- 506 Forms
- Student Acheivement Records and GPAs
- Student Attendance Records
- Drop-out Records
- Financial Need Eligibility Records
- Demographic Data

ENROLLED INDIAN STUDENTS

Date: December 1982

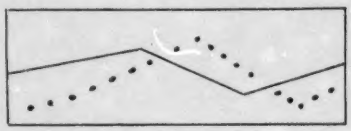
- Distribution by schools
- Distribution by grade level
- Distribution by residential areas
- Distribution by tribe
- Number in JOM, Title I, Title IV, etc.
- Number served in each Title IV component





Pie Charts

Graphs



506 Forms 1981-82

Taft Jr. High School _____

9th Grade _____

BigGoose, Bobby _____

Bear, Susan _____

506 Form Data

September 1982

Bear, Mr. & Mrs. John
1402 N.W. 32nd
Templeton, Oklahoma 77001

918-444-0023

CHILDREN ENROLLED IN SCHOOL:

NAME Bear, Susan
SCHOOL Taft Jr. High
GRADE 9th AGE 13

NAME Bear, Tommy
SCHOOL Lincoln Elementary
GRADE 4th AGE 9

21

PROJECT FILES

BUDGET

- Approved Budget Line Items and Budget Breakdown
- Approved Budget Revisions
- Grant Award Documents
- Final Financial Reports
- Source Documentation
  - Purchase Orders
  - Invoices
  - Receipts
  - Cancelled Checks
- Computer Printouts
- Monthly or Quarterly Reports

SAMPLE: Title IV Monthly Management Report (Budget) **DATE:**

A. Approved Line	B. Approved Budget	C. Outlays	D. Obligated Funds	E. Unobligated Funds
1. Personnel Full Time Part Time Hourly		(Checks written)	(Purchase Orders written or contracts signed)	Balance (Approved Budget less outlays and obligated funds)
2. Fringe Benefits FICA Life Ins. Retirement				
3. Travel Mileage Workshops Student				
4. Supplies Office Student				
5. Etc.				

PROJECT FILES

REPORTS

- Final Performance Report
- Final Financial Report
- Annual Evaluation Report
  - Process
    - Evaluation
    - Data
    - (Monitoring)
  - Product
    - Evaluation
    - Data
- Interim Evaluation Reports
- Periodic Monitoring Reports
- Inventories

Whitesport Title IV-A

SAMPLE EQUIPMENT INVENTORY

DATE_____

NUMBER ON HAND	DATE ORDERED	NUMBER ORDERED	DESCRIPTION AND MODEL NO.	PURCHASE ORDER NUMBER	COST PER UNIT	TOTAL COST	DATE RECEIVED	VENDOR	USE OR LOCATION	LOSS OR REPLACEMENT

SUPPLIES INVENTORY

Date_____

On Hand	Quantity Ordered	Date Ordered	Description	P.O. Number	Cost Per Unit	Total Cost	Date Received	Vendor	Student or Office	Loss or Replacement